

## INNOVATION FORECASTING

ROBERT J. WATTS and ALAN L. PORTER<sup>1</sup>

### ABSTRACT

Technological forecasting is premised on a certain orderliness of the innovation process. Myriad studies of technological substitution, diffusion, and transfer processes have yielded conceptual models of what matters for successful innovation. Yet most technological forecasts key on limited empirical measures quite divorced from those innovation process models. We glean a number of concepts from various innovation models, then present an array of bibliometric measures that offer promise of operationalizing these concepts.

Judicious combination of such bibliometrics with other forms of evidence offers an enriched form of technological forecasting that we name “innovation forecasting.” This provides a good means to combine technological trends, mapping of technological interdependencies, and competitive intelligence to produce a viable forecast. We illustrate by assessing prospects for ceramic engine technologies.

### Introduction

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<sup>1</sup> ROBERT WATTS is on the senior staff of the U.S. Army Tank and Automotive Command, Warren MI.

ALAN PORTER directs the Technology Policy and Assessment Center, and is Professor of Industrial & Systems Engineering, and Public Policy, at Georgia Tech.

Address reprint requests to Robert Watts -- [wattsb@cc.tacom.army.mil](mailto:wattsb@cc.tacom.army.mil)

For information about Technology Opportunities Analysis, contact Alan Porter -- [alan.porter@isye.gatech.edu](mailto:alan.porter@isye.gatech.edu)

## Report Documentation Page

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Technological forecasting purports to provide timely insight into the prospects for significant technological change. Such information should help management make better decisions with regard to strategic corporate planning, R&D management, product development, investment in new process technology, production and marketing, purchasing of new technology, and so forth. Technological forecasting encompasses varied objectives, time horizons, and approaches [c.f., [1-3]. Table 1 offers one listing of forecasting techniques as categorized by Vanston [4].

The conceptual foundation upon which technological forecasting rests is a degree of orderliness in the innovation process. Emergence of new or improved technologies depends on successful completion of the innovation process -- "any system of organized activities that transforms a technology from an idea to commercialization"[5].

We draw upon various innovation and technological change models to generate a set of concepts pertinent to gauging the prospects of particular technologies becoming successes. Various technological forecasting approaches provide context for our "innovation forecasting." This draws particularly upon bibliometrics, which we briefly overview. We propose candidate bibliometric measures to operationalize a number of innovation concepts. The second part of the paper illustrates "Innovation Forecasting" by showing how selected measures can be combined with other information to assess the prospects for ceramic engine innovation.

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Insert Table 1 about here

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### **Toward "Innovation Forecasting"**

Attempted technological innovation may or may not be successful. Successful innovation relies on many

variables, including: the technology's characteristics, the fit between the innovating firm and the technology, familiarity of the firm with the market and associated infrastructure, market forces, the economic climate and resource commitments, other socio-economic factors, and institutional actions or interactions [c.f., 3,5,6]. Underlying each of these variables there exist organizational elements that view a new technology from different perspectives and act to influence its development toward their own interests [7]. As an example, in assessing national strategic value, a country might well appraise a new technology's trade balance implications; the technology's indispensability (i.e., viability of substitutes and associated economic impacts, if displaced); the development capacity and pervasiveness (e.g., diffusion capacity to other industries); the available work force skills and know-how; the versatility and flexibility of the resulting industry; the exploitation of resources; and the attendant environmental impacts [6,8].

Much research on technological innovation documents the factors that either promote or inhibit successful product development. Many researchers have performed post-mortem assessments of technology transfer activities, technology diffusion, and technology substitution processes to characterize significant factors and recommend managerial practices that promote success in new product technology innovation [c.f., 9,10]. We have scavenged “innovation success” concepts from various sources. In particular:

- \* Michael Porter's 4-factors framework highlighting the importance of various competitive forces [6]
- \* William Souder's identification of statistically significant organizational factors relating to either the technical or commercial success of an innovation project [5]
- \* Steven Dunphy et al.'s juxtaposition of the factors of an “innovation funnel” [11]
- \* Clayton Smith's specification of levels and forms of substitution [12]
- \* Ted Modis' observations on compatibility with infrastructure and complementary products [13]
- \* Anderson and Tushman's evidence on the interplay of industry participants [14]
- \* Isreal Dror's use of patent information to infer design standards [15]
- \* Metcalfe's technology diffusion considerations [16,17]

- \* Cetron, Cohen, and Rogers each identifying sets of factors contributing to technology transfer [18-20]
- \* Souder et al. on roles of sponsor and adopter [21]

We will return to the innovation success concepts in the next section.

The technological literature is immense. To capture some of the information inherent in the content and patterning of the literature, a field called “bibliometrics” has emerged. Bibliometrics uses counts of publications, patents, or citations to measure and interpret technological advances. Such analyses assume that counts of papers or patents provide useful indications of R&D activity and of innovation, depending on the sources examined. Another key tenet is that one can ascertain important links by analyzing which topics occur together, which organizations produce what papers and patents, and who cites what [22]. Bibliometric applications range from the strategic (e.g., classifying British science [23]) through the tactical (e.g., providing competitive intelligence on who is doing what on a particular technology). Various forms of bibliometric analysis have emerged. Citation analysis [c.f., 24] examines referencing patterns among papers and/or patents to detect seminal contributions and interaction patterns, and even to forecast emerging research areas. Patent analysis relates patenting activity to profile company interests and trends. Publication analyses take articles and such as telling indicators of R&D activities.

Linkage is a particular interest in bibliometrics, leading to the development of several analytical approaches based on entities appearing together -- co-occurrences [25]. Co-citation analysis identifies pairings of articles jointly cited by later articles. From these cognitive structure may be inferred [c.f., 26,27]. Co-word analysis, dating mainly from the 1980s in Europe, looks for words appearing together [28]. Some focus on keywords (index terms); Kostoff has extended these analyses to whole texts [c.f., 29]. Mapping is particularly useful in facilitating interpretation of bibliometric findings [30,31].

Bibliometric limitations need to be noted. Counts don't distinguish quality and much technological

development work is not reflected in publications or patents, at least not in a timely manner. Publishing and patenting practices vary considerably across fields and by institutions (e.g., one company may publish heavily; another, not at all). Nonetheless there is a wealth of information to be mined using these approaches. Such information should be combined with other measures and expert opinion to develop a balanced assessment [32].

Forecasting -- including technology or technological ("tech") forecasting -- depends on theory, data, and methods [2]. The *theory* behind tech forecasting consists of the conceptualizations of the innovation process in its various guises. The linkage between that theory and tech forecasting practice is weak. "Innovation forecasting" seeks to tighten this linkage to take better advantage of lessons learned in efforts to model innovation processes. *Data* for tech forecasting are usually weak. Emerging technologies offer only short time series potential to begin, but this is typically weakened because government has not emphasized collection of tech indicators<sup>2</sup> and industry often seeks to protect proprietary information. Expert opinion becomes a vital complement to statistical measures. The bibliometric measures advocated herein provide an interesting alternative data source of both quantitative counts of evidence of R&D activity and interesting text materials to be exploited. Tech forecasting *methods* (Table 1) do the best we can with limited theory and data. The cornerstone for Innovation Forecasting is Monitoring.

Monitoring is vital in its own right to comprehend "who is doing what now?" with respect to a technology under scrutiny. It underlies forecasting in two critical ways -- forthcoming tech change is foreshadowed by current developments and will be influenced by changes in related technologies and socio-economic influences. Monitoring of the target technology, related technologies, and the relevant contextual influences is the most essential ingredient in effective tech forecasting [2].

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<sup>2</sup> Of course there are many notable sources of data on technology, for instance: the U.S. National Science Foundation's biennial *Science and Engineering Indicators*, UN Statistical Office data on exports by SITC categories, Elsevier's ??*Electronics*

Innovation Forecasting extends traditional monitoring (e.g., literature review) by tapping the newfound electronic information resources. Information on a given technology often abounds on the Internet and in electronic databases. We emphasize the latter because the data have been screened and structured. However, the worldwide web is a rich “icing on the cake” in providing access to a wealth of more current and more varied sources. As intelligent search and retrieval tools improve, the web will become an increasingly valuable source for tech monitoring.

Since 1990, the Technology Policy and Assessment Center at Georgia Tech has been developing a bibliometrically based approach to technology monitoring, forecasting, and assessment. Since 1993 this has centered upon development of proprietary software to facilitate exploitation of bibliographic (text) sources -- the Technology Opportunities Analysis™ Knowbot (“TOAK”). TOAK has enabled us to collect a range of measures from electronic search results [33]. Those searches take place in large, publicly accessible databases such as *The Engineering Index* (“ENGI”), *INSPEC*, and *U.S. Patents*. TOAK capabilities have advanced in an iterative, empirical fashion -- the software enables a tabulation; that leads TOA analysts to request a refinement; the programmers provide that capability; the analysts working with particular users then come up with additional desires; and so forth. The result has been a nice growth in empirical capabilities to identify technological opportunities

We now turn to using the empirical capabilities of TOA (bibliometrics) to operationalize the innovation concepts compiled from the technological innovation, diffusion, and transfer literatures. The premises are that those concepts provide important clues to the potential success of nascent innovations, and that those concepts can be measured. Bibliometrics provide a nicely accessible and cost-effective means to obtain critical innovation measures in a timely fashion for mid-term forecasting (i.e., 3-10 year horizon). The resulting sets of conceptually-linked

measures, when combined with other information such as expert opinion, can provide a better basis to forecast the prospects for successful technological innovation.

## **Innovation Forecasting**

### WHAT

Innovation Forecasting seeks to garner information on:

1. Technology Life Cycle status
2. Innovation Context receptivity
3. Product Value Chain and Market Prospects

Technology Life Cycle information keys on determining how far along the development pathway the technology has advanced, its growth rate, and the status of technologies upon which it is dependent. Contextual factors include economic and other influences on development of the target technology. Product Value Chain issues concern the potential payoffs and requirements to enable them to be fulfilled. These influences interlink in complex ways so that our separation is somewhat arbitrary.

Tables 2, 3, and 4 offer our distillation of technological innovation process concepts for which we believe bibliometric measures can be obtained. Table 5, discussed in the next subsection, indicates steps to be taken to gather and interpret such measures. To set the context, our approach calls for downloading a set of bibliographic abstracts (e.g., perhaps 100 -- 10,000) gathered on the topical technology (or function or product) of interest. One then tabulates and analyzes that information in various ways to get at the innovation success indicators.

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Insert Table 2 about here

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The **Technology Life Cycle** indicators begin by locating the focal technology on a putative life cycle curve.

The simplest metric is to count the number of hits from searching on the technology in various databases that emphasize different stages along an *R&D Profile* (Table 2). The precise databases to be explored depend on availability<sup>3</sup> and the nature of the target technology. For instance, were one probing the status of a new chemical, *Chem Abstracts* would be preferable to the general S&T databases indicated.

*Growth rate* can be ascertained by partitioning the item counts, either for the general technology or for specific contributing technologies, over time. This can combine nicely with the R&D Profile by plotting hits/year in each database studied. In the “clean” case, one would expect to see the topic first rise, then decline, in fundamental research; with a similar, but lagged, pattern in a more applied research database; followed, in turn, by evidence of development, application, and possibly impact.

Trend models can be fit to bibliometric time series data. Examination of raw frequencies can be informative. Moreover, fitting of logistic growth curves (c.f., [2]) to cumulative frequencies can help one perceive the life cycle with respect to the underlying aspect being tracked. Evidence of a fast life cycle has significant implications for other innovation factors too, implying heightened sensitivity to complementary technologies and the innovator’s

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<sup>3</sup> The TOA approach relies on accessing sets of abstracts in electronic form. To keep costs reasonable, this implies that one must license access to the databases of prime interest rather than paying for each abstract downloaded. This is supported by database providers offering CD-ROM and unlimited access dial-in subscriptions to their databases.

market experience.

Several databases provide technology class codes -- for instance, *INSPEC, Derwent's Worldwide Patents*. Occurrence of secondary codes in conjunction with a target technology provides an indicator of technology diffusion.

Software such as the Georgia Tech TOAK can facilitate quick tabulation of keywords, title words, abstract words, and abstract phrases. Jumping ahead a bit to our ceramic engine example, Table 9 notes certain materials, including "superalloys." By pulling up the abstracts in which the term is prominent, one can see what needs and issues are being addressed (e.g., Table 9 shows that one abstract linked superalloys with "production"). Depending on one's initial familiarity with the focal technology, selectively examining search results in this manner can be an effective way to delimit many of the vital issues. (We emphasize that it is highly desirable to validate such observations by experts in the technology.)

*Maturation* can be gauged by recognition of the sorts of issues linked to the technology and the degree of detail (this will be illustrated in depth in the ceramic engine example to follow).

*Offshoots* suggest additional variants of the technology that may have potential in their own right. These could include incorporation of the technology, or one or more of its major components, with other technologies to form functional systems. Working backwards in the ceramics case, we found that most of the R&D was being done with semiconductor interests. From the standpoint of those developing that technology, ceramic bonding of engine parts would likely be an offshoot technology, as well as a different application domain.

Table 2 emphasizes indicators deriving from publication and patent abstract databases. One could extend the list to other bibliometrics. For instance, examination of the most cited authors is a strong indicator of leaders in the

field. Profiling of citation patterns across fields or sectors can point to likely progression (e.g., interest in the use of scanning tunneling microscopy rapidly spread across multiple fields enabling molecular level R&D never before possible).

Table 3 sketches **Innovation Context Indicators**. The TOAK software facilitates tabulation of which other technologies, features, and issues are prominent in the search set results (e.g., in the 214 abstracts relating to ceramic turbines analyzed later). These can then be grouped (e.g., “production” issues, “automotive” applications, components relating to “injectors”) to develop a map of the related technologies [33.] Another approach is to develop a “tree” showing a system branching into its component functions, with particular technologies contributing to attainment of each function shown as another branching layer.

Such analyses can identify alternative technologies to the target technology or *alternative technologies* for component technologies. In terms of innovation prospects for the target technology, alternative technologies competing with it for potential market are a threat; they may warrant separate examination of their own innovation prospects. Conversely, identification of alternative component technologies to fulfill a need of the parent target technology are a boon. If one were an automotive manufacturer considering commitment to some aspect of ceramic engines, having several alternative technologies competing for your favor would enhance your prospects of finding a successful, and cost-effective, component for that need.<sup>4</sup> In this situation, one would likely probe to ascertain the *Status* of each of those technologies (analogously to how we describe determining the status of the original target technology). In addition, one could benefit by identifying the *Players* to seek potential contacts. In the ceramic engine case, the Army Tank- Automotive Research, Development & Engineering Center (TARDEC) managers

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<sup>4</sup> Conversely, if one represented the developer of the technology, the absence of viable alternatives could make one’s technology “Indispensable,” enhancing Product Value Chain prospects.

pursued technology decomposition to identify the “tree” of contributing technologies, then identified the status of development and who was pursuing those with the intent of leveraging that external R&D. Indeed, one result was the establishment of TARDEC programs to adapt ceramic technologies under development elsewhere to tank needs.

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Table 3 about here

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A number of socio-economic factors extend beyond the technological context just noted. *Technology Accessibility* may be constrained by other companies’ or agencies’ patenting. Patent concentration profiles can be developed by combining search on the technology term per se, pertinent patent subclasses, and closely linked technology terms or specific applications. Given the sometimes wily ways of patent attorneys, a combination of measures may be needed to comprehend the situation. It may be particularly helpful to also search on the key companies interested in the technology to determine if they, in fact, have patent concentrations spreading around the technology per se. Profiling competitor activities in terms of both patents and publications can provide valuable competitive intelligence.

We have found that a set of electronic abstracts can provide a gratifying sweep of information. While perhaps not decisive, a search on a target technology is likely to indicate if attention is being directed to standards, regulations or other legal obstacles, and other critical supporting or impeding factors. If one locates significant activity, time slices may help show whether the topic is heating up and how it is spreading. Finally, we note that topical activity in the popular press or the policy literature can show trends in public interest (e.g., any indications of opposition to particular applications of the target technology on environmental or other grounds?). This can be augmented by search and retrieval wherein certain key phrases, such as “pollution,” or “ban,” are linked to the target technology.

**Product Value Chain Indicators** (Table 4) seek to evaluate the market potential for the technology, possibly

from the perspective of a particular enterprise (e.g., its developer). *Gap Analysis* begins by laying out the set of enabling technologies required to take the technology to market. The analyst then steps through each of those to ascertain whether the enterprise has the requisite capabilities in house. If not, TOA can help identify outside sources that might provide those capabilities -- e.g., through partnering, recruiting persons with critical skills, licensing critical enabling technologies. *Know-how Availability* can be suggested by noting what institutions and which individuals are active in those technologies. For instance (hint?), were these academics, this might indicate opportunities to obtain skilled consultants or hire students trained on those technologies.

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Table 4 about here

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*Application* profiles can be sketched by cumulating keywords or other terms appearing in publication or patent abstracts. This is a good way to initiate contact outside one's own domain (e.g., ceramic semiconductor vs automotive interests). As for many of the other Innovation Success Indicators, it can be worthwhile to cross-validate. Suppose we turned up some hints of ceramic prosthesis application potential in *Engineering Index*. We might now search in a biomedical database to assess the prominence of ceramics in this arena.

An extension of the Application Indicators is to ascertain *Economic Dispersion* of application activity by Sector. Many databases provide classification codes (e.g., SIC codes) that can be cross-searched to determine the extent of involvement with the target technology. That is, one performs a new search on Code X to assess the relative preponderence of the target technology.

*Geographic dispersion* is easily gauged by tabulating extent of activity by country or state codes. For instance, in a 1994 TOA analysis for the Critical Technologies Institute, we were able to show declining interest in the U.S. and Germany in metal casting R&D, but an increasing interest in China and Russia. In addition, the distribution of U.S. R&D by state was of interest to national policymakers. That study also benefited from breakout of the R&D

activity by performer type -- whereas U.S. industrial metal casting R&D showed a precipitous decline in the early 1990's, academic activity was increasing.

In sum, Tables 2-4 present a set of bibliometric measures to help the Innovation Forecaster assess the current status of a technology in terms of its Life Cycle prospects, significant contextual influences on the technology's development, and its Product Value Chain potentials.

## HOW

Table 5 lays out one way to gather electronic information, process it to generate indicators, and interpret these to generate an Innovation Forecast. This is offered as an example process, not "the" way -- our presentation of "Innovation Forecasting" aims to get others to consider bibliometric measures of various sorts and to employ them in various ways to enrich tech forecasting practices. This section offers a quick run through the steps, some of which are elaborated in the example TOA of the next section.

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Table 5 about here

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Step 1 (Table 5) initiates the search process -- e.g., on ceramic engines. This requires facility with one's search engine to target well. In particular, Boolean adjacency operations contribute greatly. A search on ceramic "and" engine would generate horrible noise; a search on ceramic "adjacent to" engine might leave out a lot. We experiment with various searches, such as ceramic "within 3 words of" engine to get on target. Incorporation of additional terms such as "trend," "forecast," "delphi," "assessment," and so forth may call up other forecasts and assessments relating to the topic technology. Where one searches depends on the focal interests. For a technology broaching commercial introduction, one might concentrate on diffusion issues, thus tapping economic and market databases. For a technology still in the laboratory, one would likely concentrate on research databases.

Step 2 examines the preliminary search results of Step 1 to refine understanding of the technology and related factors and issues to depict the “technology space” of interest and refine the search algorithms for Step 3.

Step 4 repeats Step 2, but in depth on the actual search set of abstracts generated in Step 3. This is an excellent step in which to engage subject matter experts to assure the analysis is on target. Significant “indicators” information can be generated by reviewing lists (e.g., of keywords, affiliations) to sort for leading issues and players in conjunction with the focii of Tables 2-4. TOAK generates abstract phrases that allow one to display the noun phrases containing a particular term -- a useful way to gain perspective on its context.

Step 5 involves plotting trends. These can depict technology Growth Rate, or other factors for which temporal patterns are of interest (e.g., emergence of an issue, extent of a competitor’s interest in a related technology). Fitting trend models, logistic or otherwise, can be informative. However, one should perform sensitivity analyses quite thoroughly. Bibliographic time series are vulnerable to shifts in terminology over time, noisy data, and lagging data (e.g., it takes time\ for articles to get published and more time to get incorporated into databases which often show considerable delay in completing a year’s data entries). Smoothing may be in order to reduce year-to-year variability [2]. For many purposes it will be advantageous to group several years together to compare with earlier or later time periods to ascertain changes.

Step 6 entails grouping items by type. TOAK automatically groups<sup>5</sup> academic, governmental, and business affiliations. Other groups can be tailored to meet case-specific interests (e.g., “materials” seen in Table 9).

Step 7 combines results of Step 5 with broader understanding (exemplified later for ceramic engines).

Steps 8, 9, 10, and 11 cluster like items and depict these as “maps” of various forms [33].<sup>6</sup>

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<sup>5</sup> TOAK generates cumulative lists across the records in the data set being analyzed. Classification is based on a combination of thesaurus (look up), fuzzy rules, and syntactic and semantic algorithms. TOAK “learns” with repeated use as the thesaurus grows.

<sup>6</sup> TOAK applies a variety of matrix operations over terms by records to cluster similar terms or similar records. One can address normalized or raw data, rotated or unrotated factors, independent or linked rotations, and so

Step 12 addresses one major framework. TARDEC has demonstrated utility in “technology decomposition” wherein functions are linked to alternative technologies that can achieve them, and alternative technologies are linked to component technologies. At any node of interest, one can break out key players, issues, etc.<sup>7</sup>

Step 13 is an open-ended invitation to mine the abstracts for information to key on particular Innovation Success Indicators of interest. We are still exploring.

### **Innovation Forecast for Ceramic Engines**

This inquiry addressed a possible technological substitution for the U.S. Army -- use of ceramics in place of steel in tank or automotive engine components [35]. The U.S. Army has considerable interest in advances made in ceramic engine technology. Budgetary constraints may require the existing military fleet be maintained in inventory beyond the year 2010. Rapid global technology advancements and foreign military R&D investments heighten military needs and threaten U.S. superiority on the future battlefield. Army R&D investments, therefore, must strive to maximize functional performance improvements, while retaining systems configurations compatibility (i.e., technology insertion through form and subsystem/component interface). One way to achieve this is through advanced materials engine technology insertion programs. Ceramic engine components enable lower wear rates and permit higher operational temperatures, along with the associated combustion benefits of reduced exhaust emissions

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forth to help identify clusters of interest. The key matrix manipulation applies singular valued decomposition to generate ‘factors’ on which terms or records load. This shares somewhat with factor analysis and with latent semantic indexing [34].

<sup>7</sup> With DARPA support, we are currently working to improve the TOAK software to facilitate analyst discovery processes. Our vision includes automatically marking links and applying relevance scores to generate “MASTs” (automated abstracting of abstracts) on chosen subtopics, capability to view abstracts most relevant to such a subtopic, or to call up related issues or players.

and increased engine performance (i.e., greater on-demand horsepower or extended vehicle range, enabled further by complementary ceramic component weight reductions).

Ceramic engine technology has not gone unnoticed by the commercial automotive industry. Though unconcerned about long term form and interface technology compatibility, the automotive engine manufacturers have recognized ceramic technology as industry capability enhancing, rather than destroying. Unlike the competing vehicle power source technologies, ceramic engines would promote automotive manufacturer maximization of existing investments in manufacturing and assembly, while meeting ever more stringent exhaust emission standards. Ceramic engine technology utilization, therefore, offers a medium for the orderly transition between present and future engine technologies.

A preliminary search (Step 1, Table 5) located prior forecasts, in particular, a Delphi study [36]. The Delphi respondents had identified enabling technologies and application barriers that existed in the mid-1980's. These provided good leads for further bibliometric searches on both the enabling and primary technologies from *Engineering Index* and *U.S. Patents* (Step 3). The main search addressed 1985 to 1995 on "ceramic" within 6 words of "engine." The resulting search records were downloaded in electronic form and subdivided into two files -- turbine and other. Turbines (file of 214 records) provide a possible lead technology indicator. For some purposes, the files were further pruned to include only records from the top 100 institutions -- universities, government labs, and commercial firms -- publishing on ceramic engines.

Table 6 provides the chronology of the publications for the three source groupings for the two categories of ceramic engine publications. (Note only five plots are provided in the Table 6 assembled data base shown in Figure 1 -- there were only three turbine abstracts from universities). Table 7 shows the co-occurrence matrix for the government laboratory organizations that produced the most non-turbine publications, and the number of matches of the most frequently used keywords. Similar tables were compiled for academia and industry. These tables identify the who are most active in publication of ceramic engine R&D. The co-occurring keywords begin to define the areas of concentration. One can note the balance of development cycle participants, with industry taking a strong lead in applied research and development. For less mature technologies (i.e., electrorheology or artificial

intelligence), a greater proportion of activity by basic research institutions and lower activity from influential sponsors might be observed. The abstracts also revealed a balance of R&D activity across the industry infrastructure (i.e., components, engine, and vehicle manufacturers).

Table 6 reveals a surge in publication activity in 1987 from all three source groupings for non-turbine topics. The Delphi study conducted during this period provided expert opinions on the benefits and barriers, and rate of progress in overcoming the barriers, for utilization of ceramic engine components[36]. Current literature points to the following enabling issues: lower cost raw materials; more efficient and lower cost manufacturing processes; component materials consistency and end product structural verification (i.e., nondestructive testing); and ceramic coating, bonding and joining technologies. Production cost reduction is important to the use of ceramics; advantages to applying ceramics to wear resistant parts have been confirmed [37]. This general theme of acknowledged potential rings through the referenced material with the exception of Razim and Kaniut, who elaborate on the hurdles confronting ceramic engine component adoption [38]. In addition to the material weaknesses at which research has been directed, these authors pointed out the salient issues of limited materials design experience, material properties verification, and, most importantly, different performance standards expected of the new material (i.e., higher operational temperatures and speeds, and lower use of ancillary cooling and lubrication support systems).

The literature conveys that the advantages of ceramic components have begun to be proven -- the technology is maturing. The three most cited barriers include cost, material properties verification, and coating & bonding technologies -- three candidates to explain the 1987 surge in publication activity. Using the terms "ceramic" adjacent to "coating" or "ceramic" adjacent to "bonding" yielded 234 related patents during the 1980 to 1995 period. Table 8 and Figure 2 depict the chronology of patents issued and the cumulative patent growth in the ceramic coating and bonding field. The significant rise in number of patents issued in 1986 and 1987 may provide an explanation for the industrial publication surge in 1987 -- with proprietary confirmation in hand, a technical capabilities announcement through these publications could follow. The anticipated precadence of applied research publications ahead of patents appears to be violated here. The drop in patent activity in 1994 might represent the passage of an inflection point on the technology growth curve. Knowledge growth and engineering productivity in a given

technology have often been likened to a logistics function, as might be predicted by the Fisher-Pry equations. The cumulative ceramic coating and bonding patents were modeled (Step 7, Table 5) by three Fisher-Pry equations, each with a different technology growth limit (i.e., 350, 450, and 550 patents). Each of the three equations provided coefficients of determination greater than .99. The growth limits were selected because limits below 350 patents and above 600 patents provided lower coefficients of determination. These equations were then used to generate patent forecasts through the year 2005, as shown in Figure 3. The upper and lower growth limits provide a visual sensitivity analysis for the models and serve as surrogate confidence intervals for the future growth in this technology, assuming that 450 patents represent the actual anticipated growth. In assessing these growth curves in respect to technology maturity, we suggest that, although the capabilities have begun maturing and new entry into the field would be most difficult because of the pace being set by the current participants, there still will be significant technology growth in the next nine years.

To extend the maturity analysis from enabling technologies (i.e., ceramic coating and bonding) to ceramic engine technology more generally, two bibliometric approaches were applied. First, the 100 most used keywords from the 426 non-turbine ceramic engine abstracts were subdivided into two groups: material types and a combined group of material properties and applications. We then generated a co-occurrence matrix, materials versus properties and applications (Table 9). Two observations from this table, in regards to ceramic engine technology, include the apparent emergence of silicon nitride as the ceramic material of choice and the presence of competing materials (e.g., aluminum compounds, metal matrix composites, metals and alloys, superalloys). For silicon nitride (Row 1, Table 9) note the considerable level of use of application, process, and property verification terms -- an indication of technological maturation.

To obtain a temporal perspective on the types and usage of keywords related to ceramic engine technology, the non-turbine ceramic engine abstract file was sub-categorized into five two-year periods of publication abstracts. Co-occurrence matrices of sources vs keywords were generated. Table 10 summarizes the co-occurrence matrices by defining the level of activity (e.g., the number of discrete publication sources and associated number of publications) and the level of focus of the documented research (e.g., the number of discretely different keywords). The evolution

of a technology can be observed in Figure 4, which depicts Table 10 data, and considered in terms of the Utterback and Abernathy model on product and process innovations [39]. That model prescribes that early research is product focused and attracts many industry participants. Once a dominant design emerges, research shifts toward process technology and the number of industry participants declines. In the 1987-88 period, the level of interest in the technology peaked as indicated by the numbers of publications (207) and participating organizations (120). The areas of R&D, however, were quite focused, as indicated by the number of different keywords used (29). Contrast this profile with that for 1993-95: far fewer participating organizations (42), a proportional reduction in number of publications, but tremendous expansion of the detail and issues addressed (201 different keywords used)!

To see the evolution of the types of technological activities addressed over the time periods, the common keywords across periods were eliminated. Table 11 presents the chronology of the use of the remaining words. Innovation sequences often start with an invention (e.g., technology application such as the invention of the internal combustion engine), followed by the emergence of related sciences (e.g., tribology, combustion, etc.). As observed in Table 11, the ceramic engine technology terms have evolved toward analytic sciences in addition to expanding to processes, material properties verification, and application fields. This supports the notion of a maturing technology poised to assume niche positions in specialty material growth markets.

The other two application barrier issues, cost and manufactured material property verification, support the coming of age of ceramic engine technology in a different manner -- through the absence of publicly available information. Component cost data were sought through both literature review and phone contacts with material journal publishers and ceramic engine component manufacturers. These efforts uncovered the fact that ceramic component cost data represent confidential information between component suppliers and end item (e.g., automotive and engine) manufacturers. The engine manufacturers have begun using ceramic components (Table 12) and must perceive that their actions provide a competitive advantage. One can assume that until an after-market emerges for replacement ceramic engine components, cost information will most probably be closely guarded. Takao et. al. [37] note that once a component probability of failure on the order of  $10^{-6}$  has been achieved, the material weight used in automotive systems is inversely related to the square of the component cost to weight ratio( $WP^2$ ). This material cost

to weight relationship remains true except when government requirements (i.e., exhaust emissions) mandate a materials usage, as in catalytic converters. Since ceramic component usage has begun, one might assume that the above probability of failure level has been achieved and verification procedures developed. However, component material property verification both reflects and embodies one competence of the manufacturing process. Management of technology principles stress that distinctions must be made between technologies and technical competencies. Competencies represent the essence of competitive advantage and must be more closely protected than technologies, which can be imitated and designed around. Manufacturing competence involves a complex mixture of employee training and involvement, supplier integration, statistical process control and value engineering, as well as design for manufacture and end product verification [40]. A search of *U.S. Patents* using the terms "ceramic material quality," "ceramic non-destructive test," and "ceramic property test," uncovered only four relevant patents. The fruitless component cost and patent searches, along with commercialization announcements, support one conclusion: the manufacturing costs and process verification techniques are being held secret to obtain and maintain competitive advantage.

## **Interpretation**

This assessment concentrates on the issues considered most relevant to Army policy decisions related to this technology. Institutional forces impact ceramic engine developments. As affirmed by the bibliometrics, ceramic engine R&D emanates from government laboratories and the automotive industry infrastructure, not from the ceramics industry (that emphasizes semiconductors in particular). This fact warrants that the ceramics industry R&D be monitored by the automotive sector for potential "Offshoots" -- desired ceramic functions -- to speed recognition and diffusion of new technology discoveries to automotive applications.

The automotive industry "need" for specialized engine materials, including ceramic components, has resulted primarily from government mandates on exhaust emissions and fleet fuel economy standards. This imposed need

creates a delicate balance between the degree of legislated stringency and the allocation of commercial R&D resources. Too tight or too loose legislative mandates would significantly reduce the commercial R&D available to leverage. This suggests ongoing monitoring of regulatory developments.

Zero-based exhaust emission requirements could force premature adoption of electric vehicle (EV) technology and pull scarce R&D resources away from ceramic engine development. Less stringent requirements could reduce the demand for more efficient, hotter burning, and lighter engines, and could drain commercial ceramic engine R&D. Gradual and ever-tightening requirements are likely to promote specialized component development and extend the evolution of the internal combustion engine (ICE). This scenario advances automotive manufacturing capital investments stability and a supporting infrastructure that remains familiar to a large proportion of the participants, both businesses and consumers alike, thereby promoting the probability of technology acceptance.

Another oil embargo or an extended Middle East War could drive oil and fuel prices higher and make alternative, perhaps methanol, fuels more competitive in respect to cost. However, current ICE incompatibilities preclude the use of fuels such as methanol without experiencing high engine wear rates and increased oil consumption [41]. An accelerated development pace for specialized materials, particularly to modify engine combustion chambers with high temperature, corrosion-and wear-resistant materials, would better prepare the country for such a crisis. Implementation, obviously, would still be subject to a mortality substitution rate, one which under normal attrition would require ten to twenty years to transition. Again, these contextual influences on ceramic engine innovation merit continued monitoring.

The most significant impact of ceramic engine technology adoption and commercial diffusion will be on automotive component suppliers. Ceramic engine technology represents the early stage of a materials revolution, one where material properties will be designed and developed for specific applications. Suppliers lacking material design capabilities, as well as the emerging specialized material manufacturing and component properties certification competencies, will be supplanted by larger more affluent companies that can and will develop the needed skills. Ceramtec Division of Hoechst A.G., Kyocera Corporation, NGK Spark Plug Company, and Enceratec Incorporated (Table 12) represent a sample of the firms that have begun strategically positioning themselves to be

the next generation automotive component suppliers. One can speculate that the automobile industry involvement in the ceramic engine and specialized material R&D activities strives to develop suppliers' certification capabilities and, more importantly, to have proprietary interest in the new technology to create licensing revenues and avoid limited source situations. This automotive industry supplier issue could force costs higher due to inadequate competition. These higher costs would impact the Army fleet due to increases in both initial acquisition and operational and support (O&S) component expenses.

## **Conclusions**

Bibliometrics are limited by the secrecy of some R&D and variations in publication practices among organizations. This was demonstrated by conspicuous absences of firms such as General Motors and Chrysler from the publications and patents on ceramic engine technology. It would be naive to believe these companies' R&D programs do not include ceramic engine technology. Such variations in publication practices create caveats against simplistic literature source analyses. More importantly, they justify the more sophisticated bibliometric process analyses and measures proposed in this paper. Time lags between R&D performance and subsequent documentation also limit bibliometrics. To confirm conclusions from our Innovation Forecasting, expert opinions were obtained from Tank-automotive Research, Development and Engineering Center (TARDEC) propulsion personnel and the Ceramic Information and Analysis Center (CIAC) at Purdue University. Such expert opinion usage should be standard practice. As demonstrated with the ceramic engine case assessment, bibliometric limitations can be minimized by searching for general trends, rather than specific events. Innovation forecasting processes and models, Tables 2-4, can also provide corroborating analyses for traditional forecasting techniques, Table 1.

This case analysis demonstrated that innovation success factors can be gauged by using bibliometric measures. These, in turn, serve to assess prospects for next generation technologies. Many innovation concepts were applied during the sample ceramic engine forecast. In particular, we point to the effort to operationalize a number of the Innovation Success Indicators offered in Tables 2-4. A key to the conclusions drawn, resulting in initiation of two

major TARDEC ceramic engine programs, was the evidence that this family of technologies is really maturing.<sup>8</sup>

The evolution of keyword usage and the empirical evidence of movement toward process technology development proved especially compelling.

Our development of “Innovation Forecasting” continues. Monitoring programs promote technology awareness and diffusion to operational programs. This goal is being pursued through a joint Defense Advanced Research Projects Agency (DARPA) and Tank-automotive and Armaments Command (TACOM) Small business Technology Transfer (STTR) program. Under this combined program, the TPAC Technology Opportunities Analysis Knowbot (TOAK) will be modified to expand its analysis capabilities and to implement a menu-driven operator interface. The enhanced TOAK will facilitate the development of a database containing military vehicle technologies hierarchy breakout (“technology decomposition”). Related “technology space” information (i.e., the who, what, when, where, and how) can be updated as needed. One of the efficiencies of the Innovation Forecasting approach is its use of established databases. Sources such as *Engineering Index* and *U.S. Patents* are orders of magnitude richer than one’s own database could ever be. Through tools like TOAK we are able to tap such resources quickly and effectively.

We invite others to consider the use of bibliometric indicators as a major asset in forecasting technology. The framework proposed in Tables 2-4 is a start toward truly more effective “Innovation Forecasting.”

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<sup>8</sup> This was a true challenge because the Army had been “burned” before -- investing in ceramic technologies into the 1980’s without notable payoff -- so considerable initial skepticism had to be overcome. The Innovation Success Indicators accomplished this.

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**Table 1.**  
**Forecasting Techniques**

**Extrapolator**

Technical Trend Analysis\*\*  
Substitution Analysis \*\*  
Growth Limit Analysis \*\*  
Learning Curves \*\*

**Pattern Analyst**

Analogy \*  
Precursor Trends \*\*  
Morphological Analysis  
Feedback Models \*\*

**Goal Analyst**

Implication Analysis  
Content Analysis \*  
Stakeholder Analysis  
Patent Analysis \*

**Counterpuncher**

Scanning  
Monitoring \*  
Alternate Scenario Planning \*  
Monte Carlo Models \*\*

**Intuitor**

Delphi Surveys \*  
Nominal Grp. Conference \*  
Structured/Unstructured Interviews \*  
Comprehensive Opportunity Analysis \*

\*\*Highly Quantitative

\* Semi-Quantitative

**Source: Vanston, John H., Technology Futures Inc., Austin, Texas**

**Table 2.**  
**Technology Life Cycle Indicators**

<u>Factor</u>	<u>Indicator</u>
R&D Profile	
- Fundamental Research	# of items in databases such as <i>Science Citation Index</i>
- Applied Research	# of items in databases such as <i>Engineering Index</i>
- Development	# of items in databases such as <i>U.S. Patents</i>
- Application	# of items in databases such as <i>Newspaper Abstracts Daily</i>
- Societal Impacts	Issues raised in the Business and Popular Press abstracts
Growth Rate	Trends over time in # of items
Technological Issues	Technological needs noted
Maturation	Types of topics receiving attention
Offshoots	Spin-off technologies linked

**Table 3.**  
**Innovation Context Indicators**

<u>Factor</u>	<u>Indicator</u>
Supporting Technologies	
- Identification	Technologies mentioned in articles on target technology
- Status	Technology decomposition
- Players	Individuals; Institutional affiliations
Technology Accessibility	Patent concentration profiles
Requirements for Success	Status of Standards; Governmental backing; Private backing
Constraints (Regulations, etc.)	Regulations
Competition	
- Alternative Technologies	Functional equivalency identification
- Institutional Interests	Profiling competitor interests
Issues	Tabulation of issues posed (e.g., in Business press)

**Table 4.**  
**Product Value Chain Indicators**

<b><u>Factor</u></b>	<b><u>Indicator</u></b>
Gap Analysis	Self-profile over component technologies
Know-how Availability	Extent and identification of sources of trained personnel
Applications	Range of possible applications noted
Economic Dispersion	Sectoral activity concentration
Geographical Dispersion	Location of activity

**Table 5.**  
**Steps of an Innovation Forecasting Process**

1. Search on the basic topical term(s) in multiple databases
2. Download electronic abstracts from a prime, available database; examine cumulated keywords, etc., to refine topic understanding to generate a good search algorithm
3. Redo search in most advantageous database(s); download abstracts
4. Examine keywords, title words, and abstract words & phrases; and read abstracts to gain fluency with related activities, applications, key players, dispersion
5. Plot trends in overall activity; topic-specific activity; institution-specific activity; etc.
6. Consider activity patterns by type (academic, government, industry) or other delimiters of interest
7. Model the technology life cycle.
8. Cluster technological, or other, activity associated with the target
9. Map key supporting technologies; institutional interests; etc.
10. Depict maps at different time slices
11. Map likely future technological or competitive profiles, if appropriate
12. Develop a technology decomposition tree, including tagging players; breakout for key contributing technologies
13. Perform analyses on special areas (e.g., gap analysis)

**TABLE 12**  
**CERAMICS AUTOMOTIVE APPLICATIONS**

<b><u>CERAMIC COMPONENTS</u></b>	<b><u>MATERIAL</u></b>	<b><u>SUPPLIER</u></b>	<b><u>USER</u></b>
Intake & Exhaust Valves	Silicon Nitride	Ceramtec Div. of Hoechst A.G.	Daimler Benz
Exhaust Portliner	Aluminum Titanate	Ceramtec Div. of Hoechst A.G.	Porsche A.G.
Brake Engine Retarder Master Piston Wear Pad	Silicon Nitride	ENCERATEC, Inc	Cummins N14 Engine
Cam Roller Follower	Silicon Nitride	Kyocera Corp.	Detroit Diesel (Series 50)
Ceramic Tappet	Sintered Silicon Nitride (SSN)	NGK Spark Plug Co.	Nissan Diesel Motor Co.
Ceramic Coatings		Ceramics Corp. of America (Cercoa)	
Ceramic Coatings	Zirconia Coating With Strain Isolator	Technetics Corp.	